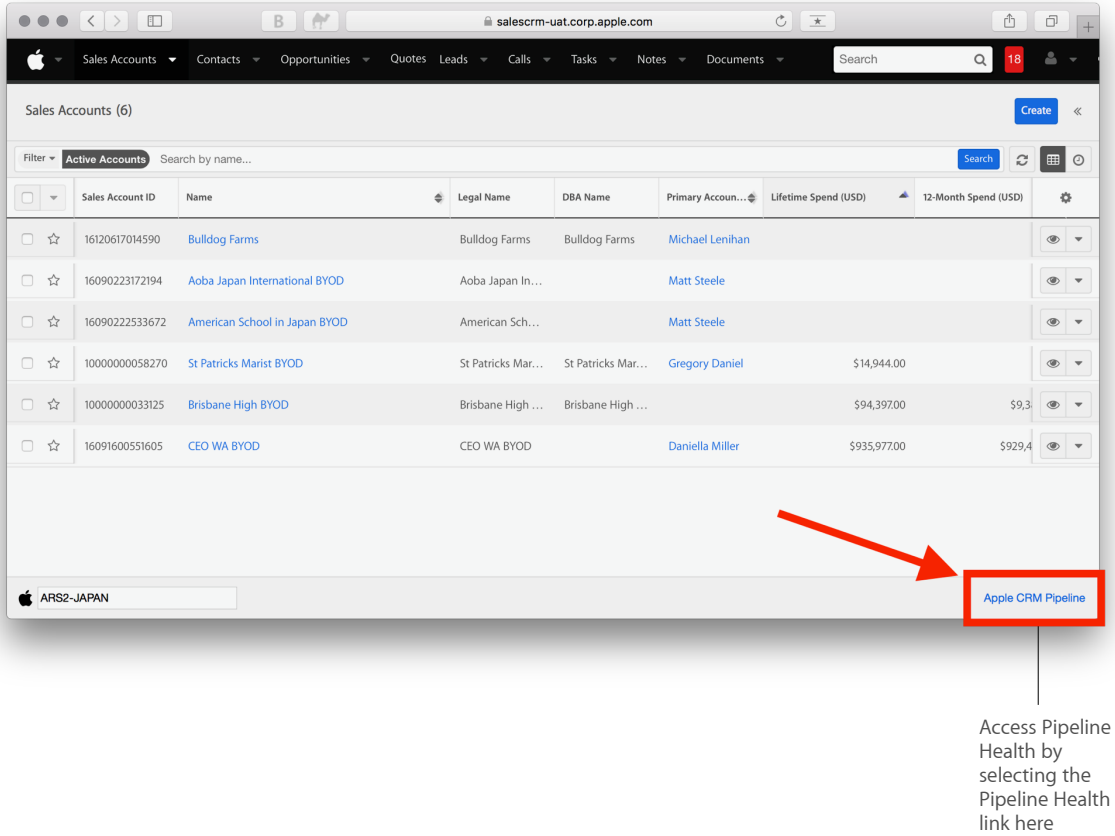
Pipeline Health

Pipeline Health is a robust pipeline reporting tool built into Apple CRM to provide insights into your pipeline of Opportunities. A healthy pipeline is one that is balanced across Opportunity stage, products, and size. While there are many ways Pipeline Health can be used to gauge the health of your pipeline, below are common workflows to get started.

Start by accessing Pipeline Health by clicking the Apple CRM Pipeline link on the bottom right hand corner of Apple CRM.



Access Pipeline Health by selecting the Pipeline Health link here

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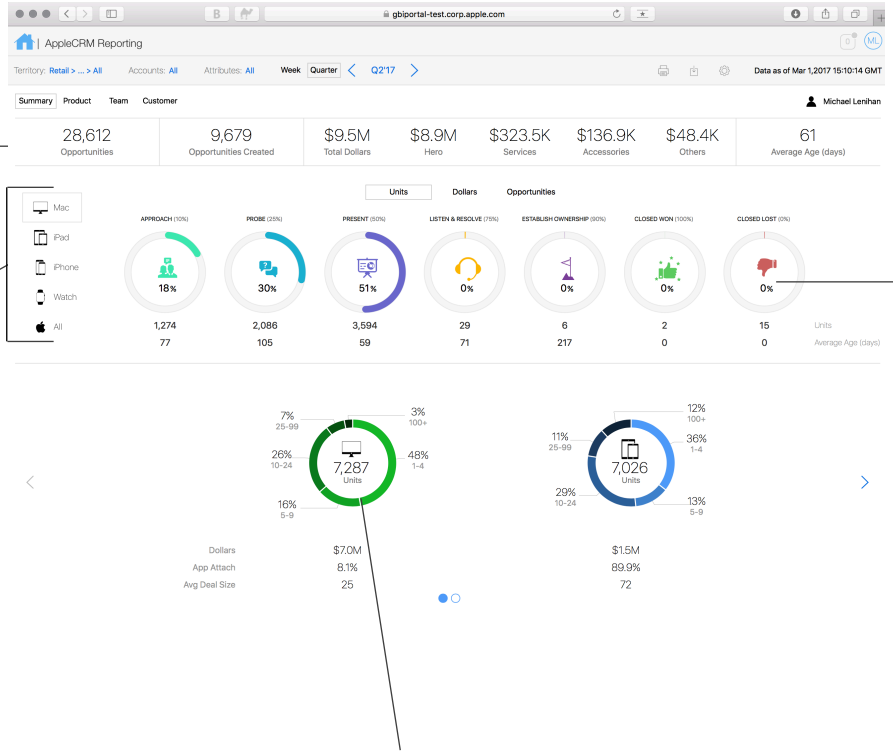
Summary View

The summary view provides a consolidated view of current pipeline metrics such as the number of Opportunities in your pipeline, the number of Opportunities by Opportunity Stage, and the total dollar and percentage of Opportunities by size, known as a deal band.

View a summary of your total pipeline of Opportunities here including number of open Opportunities and total dollar amount.

Change your view of Opportunities that are for all Products or a single product such as Mac.



View the percentage of Opportunities by Opportunity Stage

View the percentage of your Opportunities by number of units. Size is expressed as a "deal band" where each band covers a range of units.

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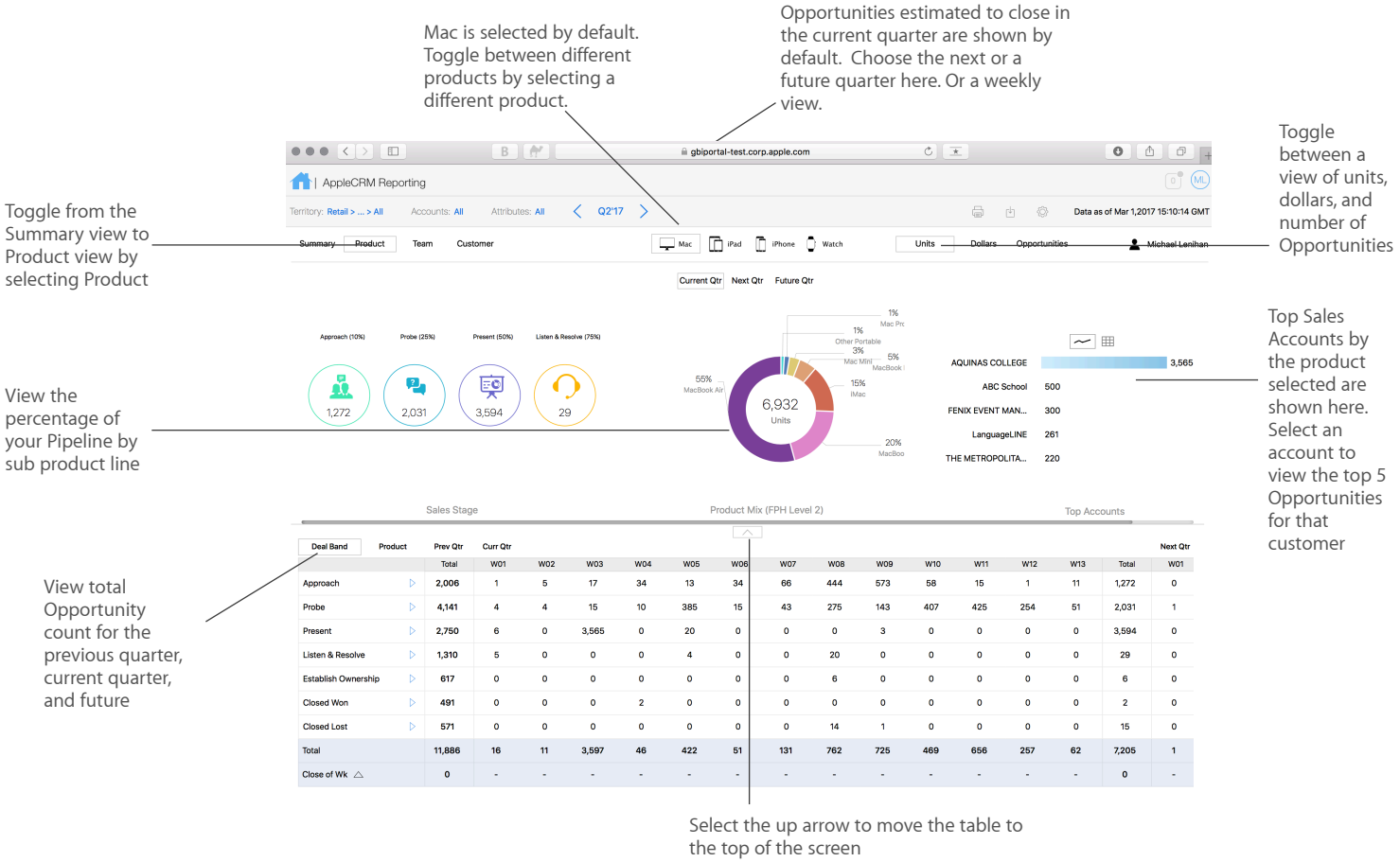
Product View

The product view allows you to view your Pipeline metrics for a specific product.


Mac is selected by default. Toggle between different products by selecting a different product.
Opportunities estimated to close in the current quarter are shown by default. Choose the next or a future quarter here. Or a weekly view.
Toggle between a view of units, dollars, and number of Opportunities
Toggle from the Summary view to Product view by selecting Product
View the percentage of your Pipeline by sub product line
Top Sales Accounts by the product selected are shown here. Select an account to view the top 5 Opportunities for that customer
View total Opportunity count for the previous quarter, current quarter, and future
Select the up arrow to move the table to the top of the screen
gbiportal-test.corp.apple.com
AppleCRM Reporting
Summary
Product
Team
Customer
Mac
iPad
iPhone
Watch
Units
Dollars
Opportunities
Current Qtr
Next Qtr
Future Qtr
Approach (10%)
Probe (25%)
Present (50%)
Listen & Resolve (75%)
1,272
2,031
3,594
29
6,932
Units
AQUINAS COLLEGE 3,565
ABC School 500
FENIX EVENT MAN... 300
LanguageLINE 261
THE METROPOLITA... 220
Sales Stage
Product Mix (FPH Level 2)
Top Accounts

Deal Band	Product	Prev Qtr	Curr Qtr														Next Qtr
		Total	W01	W02	W03	W04	W05	W06	W07	W08	W09	W10	W11	W12	W13	Total	W01
Approach		2,006	1	5	17	34	13	34	66	444	573	58	15	1	11	1,272	0
Probe		4,141	4	4	15	10	385	15	43	275	143	407	425	254	51	2,031	1
Present		2,750	6	0	3,565	0	20	0	0	0	3	0	0	0	0	3,594	0
Listen & Resolve		1,310	5	0	0	0	4	0	0	20	0	0	0	0	0	29	0
Establish Ownership		617	0	0	0	0	0	0	0	6	0	0	0	0	0	6	0
Closed Won		491	0	0	0	2	0	0	0	0	0	0	0	0	0	2	0
Closed Lost		571	0	0	0	0	0	0	0	14	1	0	0	0	0	15	0
Total		11,886	16	11	3,597	46	422	51	131	762	725	469	656	257	62	7,205	1
Close of Wk		0	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-

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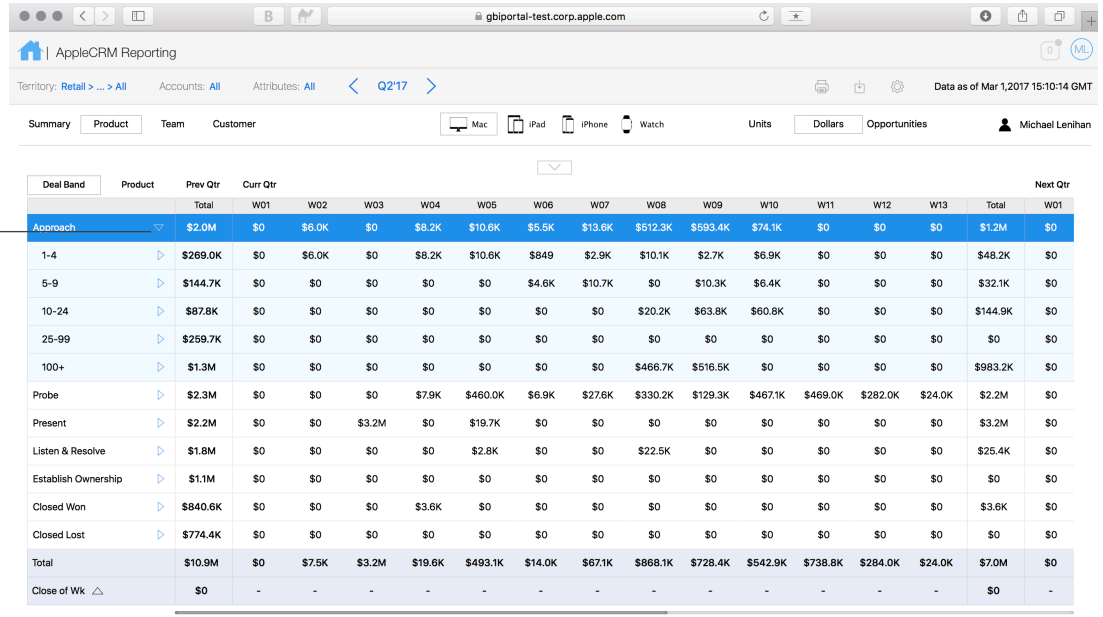
Product View continued…

Select the down arrow to view Opportunities in that Opportunity stage by deal band



Deal Band	Total	W01	W02	W03	W04	W05	W06	W07	W08	W09	W10	W11	W12	W13	Total	W01
Approach	$2.0M	$0	$6.0K	$0	$8.2K	$10.6K	$5.5K	$13.6K	$512.3K	$593.4K	$74.1K	$0	$0	$0	$1.2M	$0
1-4	$269.0K	$0	$6.0K	$0	$8.2K	$10.6K	$849	$2.9K	$10.1K	$2.7K	$6.9K	$0	$0	$0	$48.2K	$0
5-9	$144.7K	$0	$0	$0	$0	$0	$4.6K	$10.7K	$0	$10.3K	$6.4K	$0	$0	$0	$32.1K	$0
10-24	$87.8K	$0	$0	$0	$0	$0	$0	$0	$20.2K	$63.8K	$60.8K	$0	$0	$0	$144.9K	$0
25-99	$259.7K	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
100+	$1.3M	$0	$0	$0	$0	$0	$0	$0	$466.7K	$516.5K	$0	$0	$0	$0	$983.2K	$0
Probe	$2.3M	$0	$0	$0	$7.9K	$460.0K	$6.9K	$27.6K	$330.2K	$129.3K	$467.1K	$469.0K	$282.0K	$24.0K	$2.2M	$0
Present	$2.2M	$0	$0	$3.2M	$0	$19.7K	$0	$0	$0	$0	$0	$0	$0	$0	$3.2M	$0
Listen & Resolve	$1.8M	$0	$0	$0	$0	$2.8K	$0	$0	$22.5K	$0	$0	$0	$0	$0	$25.4K	$0
Establish Ownership	$1.1M	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Closed Won	$840.6K	$0	$0	$0	$3.6K	$0	$0	$0	$0	$0	$0	$0	$0	$0	$3.6K	$0
Closed Lost	$774.4K	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total	$10.9M	$0	$7.5K	$3.2M	$19.6K	$493.1K	$14.0K	$67.1K	$868.1K	$728.4K	$542.9K	$738.8K	$284.0K	$24.0K	$7.0M	$0
Close of Wk	$0	-	-	-	-	-	-	-	-	-	-	-	-	-	$0	-

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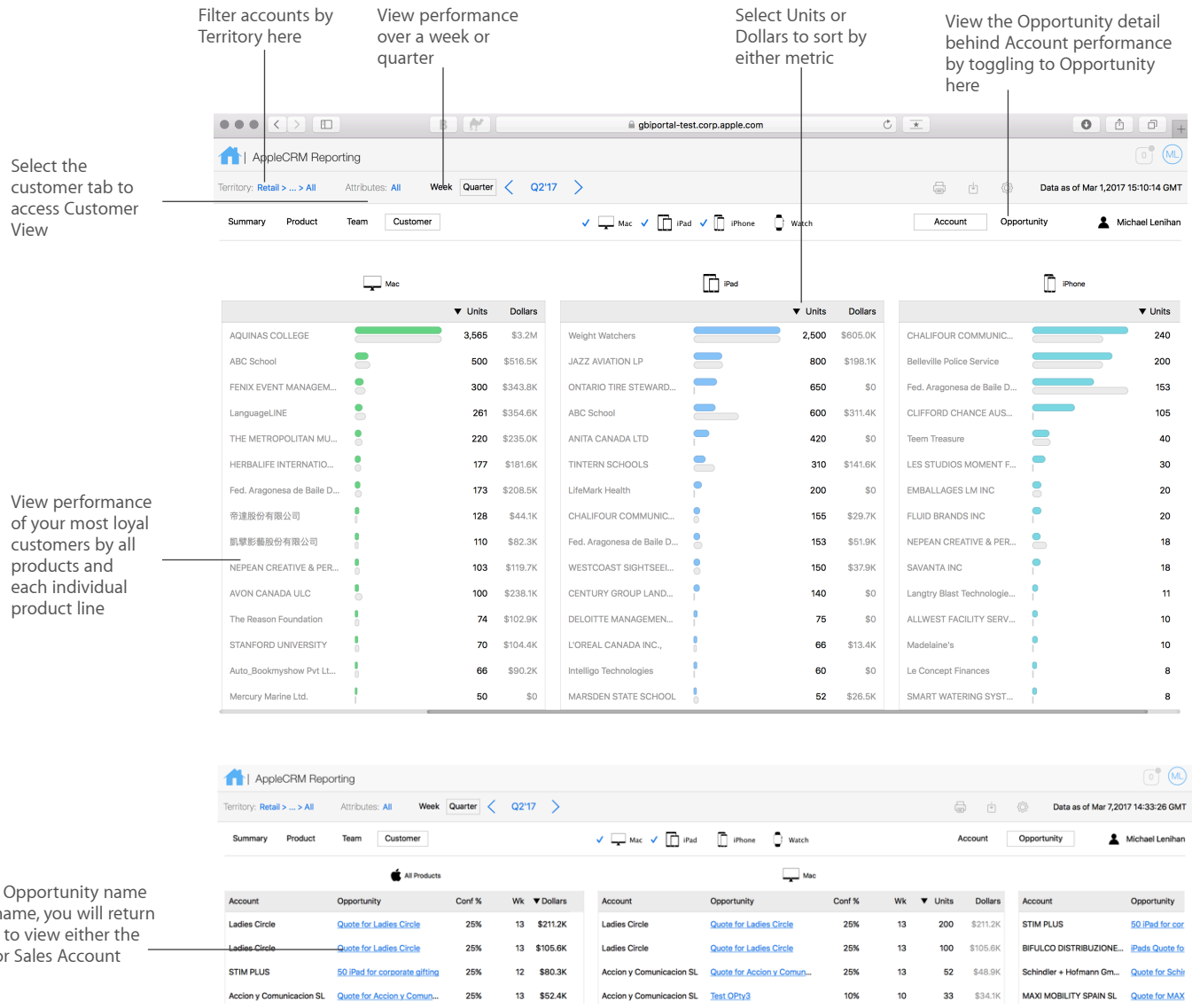
Customer View

The Customer View will show performance of your most loyal accounts. This is a helpful view for Leaders to see who their most loyal customers and for Business Team members to quickly access reports and insights on their most loyal customers.


Filter accounts by Territory here
View performance over a week or quarter
Select Units or Dollars to sort by either metric
View the Opportunity detail behind Account performance by toggling to Opportunity here
Select the customer tab to access Customer View
View performance of your most loyal customers by all products and each individual product line
By clicking an Opportunity name or Customer name, you will return to Apple CRM to view either the Opportunity or Sales Account details
gbiportal-test.corp.apple.com
AppleCRM Reporting
Territory: Retail > ... > All
Attributes: All
Week
Quarter
Q2'17
Data as of Mar 1,2017 15:10:14 GMT
Summary
Product
Team
Customer
Mac
iPad
iPhone
Watch
Account
Opportunity
Michael Lenihan
Mac
iPad
iPhone
Data as of Mar 7,2017 14:33:26 GMT
All Products

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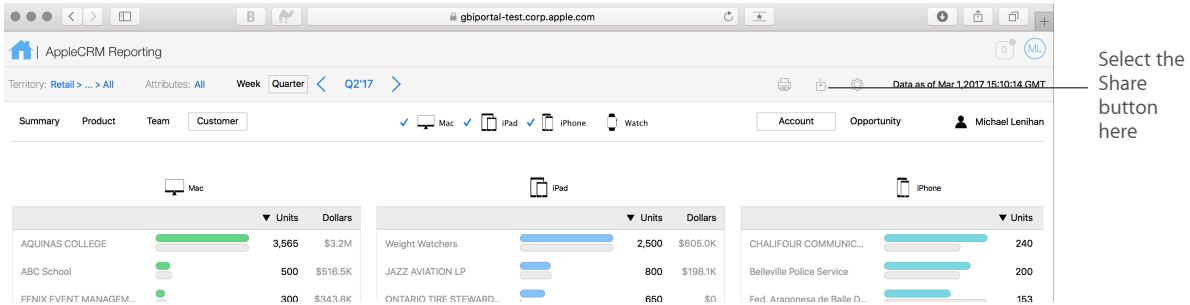
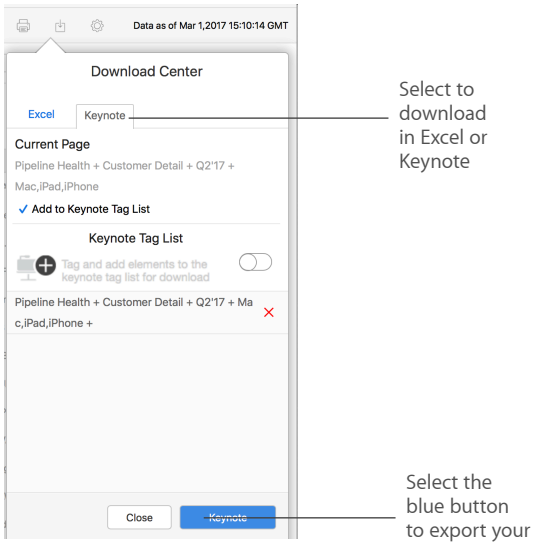
Download and Export Reports

Pipeline Health allows you to download and export reports to Excel or Keynote for further analysis or presentations.

1. If exporting is available for your view, select the Share button as shown below.



2. Select Excel or Keynote. If selecting Keynote, you have the ability to download the entire page or sections of the page. If selecting Excel, select the blue Excel button to download the report into Excel.


Data as of Mar 1,2017 15:10:14 GMT
Download Center
Excel
Keynote
Current Page
Pipeline Health + Customer Detail + Q2'17 + Mac,iPad,iPhone
Add to Keynote Tag List
Keynote Tag List
Tag and add elements to the keynote tag list for download
Pipeline Health + Customer Detail + Q2'17 + Mac,iPad,iPhone +
Close
Keynote
Select to download in Excel or Keynote
Select the blue button to export your report

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